

STATE OF CALIFORNIA

KATHLEEN CONNELL,  
Controller of California

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OFFICE OF STATE CONTROLLER  
PERSONNEL/PAYROLL SERVICES DIVISION  
300 Capitol Mall  
P.O. Box 942850  
Sacramento, CA 94250-5878

DATE: January 31, 2001

PERSONNEL LETTER # 01-003

TO: All Agencies in the Uniform State Payroll System

FROM: RALPH ZENTNER, Acting Chief  
Personnel/Payroll Operations Bureau

RE: SCO/PPSD TRAINING CATALOG FOR THE SPRING 2001 SEMESTER

The purpose of this memo is to provide the latest information regarding the State Controller's Office, Personnel/Payroll Services training classes for April - June, 2001. PLEASE NOTE THAT ALL TRAINING ANNOUNCEMENTS ARE MADE VIA ELECTRONIC MAIL. WE DO NOT PRODUCE A HARD COPY TRAINING CATALOG.

TRAINING ENROLLMENT:

On Tuesday, February 6, 2001, a Needs Assessment form for the Spring 2001 semester will be sent via electronic mail to the agencies in the Uniform State Payroll System. The training coordinator from each agency should fill in the necessary information on the Needs Assessment form and return the form to Joan Collins, the Training Administrator via FAX to (916) 324-7293 (CALNET 454-7293) no later than Friday, February 9, 2001. On or before Wednesday, February 21, 2001, the Spring 2001 training schedule will be sent via electronic mail. On Tuesday, February 27, 2001, the Training Administrator will begin to contact each training coordinator IN THE ORDER THE NEEDS ASSESSMENT FORMS WERE RECEIVED. NO PHONE CALLS WILL BE ACCEPTED IN LIEU OF THIS PROCEDURE.

In selecting a location for training, please indicate the nearest city for which you know your department will provide travel funds and which you are sure your staff will be able to attend. If there are no cities that meet these criteria, refer to the "CONSULTATIONS/SPECIAL REQUESTS" section of this letter.

We will make every effort to place trainees into the programs and dates requested. However, if placement is not possible at that time, the Training Administrator will offer other alternatives, dates or suggest a direct contact with the appropriate instructor to discuss on-site consultations or a special request training program.

Our objective is to respond to department training needs within our resource capability.

CONFIRMATION OF ENROLLMENT:

Each scheduled trainee will receive a letter approximately 30 days prior to the class date. This letter contains important enrollment information including class dates, times and location.

CANCELLATION REQUIREMENTS:

To cancel an enrolled employee, contact the Training Services and Security Section at (916) 322-1245 (CALNET 492-1245), via e-mail to jcollins@sco.ca.gov or the California Relay Service at 1-800-735-2922 (TDD) NO LATER THAN TWO WEEKS BEFORE THE CLASS. It is important that the "two weeks before" guideline be followed so that others have an opportunity to enroll in the vacated spot.

ENROLLMENT SUBSTITUTIONS:

Substitutions will be accepted provided the substituting enrollee meets the prerequisites set for the program.

COURSE REQUIREMENTS:

Prerequisites help to ensure each participant succeeds in comprehending the subject matter presented in class. PREREQUISITES MAY BE WAIVED ONLY WITH THE CONSENT OF THE INSTRUCTOR PRIOR TO THE CLASS DATE. PARTICIPANTS WHO DO NOT MEET THE PREREQUISITES AND HAVE NOT OBTAINED A WAIVER FROM THE INSTRUCTOR WILL BE SENT BACK TO THEIR OFFICE.

CONSULTATIONS/SPECIAL REQUESTS:

To request consultations or a special-request-training program, contact the appropriate instructor listed with the course descriptions or Joan Collins, the Training Administrator, at (916) 322-1245 (CALNET 492-1245) or the California Relay Service at 1-800-735-2922 (TDD).

COURSE DESCRIPTIONS AND PREREQUISITES:

Please note that our training program information is listed alphabetically by program name followed by the level (e.g., Advanced Salary Determinations class is listed as "Salary Determinations, Advanced"). For each program, the course descriptions are listed followed by the course prerequisites.

CORRECTIVE ACTIONS (2 Days)

Doris Meekins, Instructor  
(916) 324-7274 (CALNET 454-7274)  
E-mail: dmeekins@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course is a must for personnel staff who need instructions in properly documenting Corrective Actions and out-of-sequence (O/S) PAR transactions. Participants will be provided a step-by-step

method of Reconstructing Employment History (EH) for O/S transactions. Corrective Actions provides in-depth coverage of PAM Section 9 in the following areas:

- o Corrects
- o Voids
- o Voids/Re-Enters
- o Adding a Transaction O/S
- o Reconstructing EH

Through the use of the PAM and a variety of comprehensive practical exercises and transaction situations, the skills gained will enable the participants to correctly determine the appropriate steps and procedures necessary to complete corrective action documentation.

PREREQUISITES:

Is responsible for preparing a wide variety of PAR transactions. MUST HAVE COMPLETED THE PAR DOCUMENTATION CLASS AND HAS AT LEAST AN ADDITIONAL FOUR MONTHS OF EXPERIENCE BEFORE ENROLLING IN THE CORRECTIVE ACTIONS CLASS. THESE REQUIREMENTS ARE DENIED IF THE PREREQUISITES HAVE NOT BEEN MET.

EMPLOYMENT HISTORY OVERVIEW (1 Day)

Doris Meekins, Instructor  
(916) 324-7274 (CALNET 454-7274)  
E-mail: dmeekins@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course has been designed to provide instructions on updating and interpreting the information on the Employment History database. Through the use of PAM Section 10 and practical exercises the participants will be able to:

- o Utilize the decentralized forms.
- o Follow instructions for entering information to the database.
- o Identify and access the five employment history inquiry categories.
- o Analyze error messages and system problems and demonstrate methods to resolve each condition.

This class is a one-day session offered as a CONSULTATION OR SPECIAL-REQUEST-TRAINING PROGRAM. The program is portable and will be provided at your site. If you are interested in booking this program for your staff, contact Doris Meekins, the instructor.

FUNDAMENTALS OF PAYROLL (3 Days)

Blanca Hoffmann, Instructor  
(916) 324-7261 (CALNET 454-7261)  
E-Mail: bhoffmann@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course provides information necessary to correctly and confidently document basic payroll transactions in today's personnel office. The class outlines appropriate procedures, processes and regulations governing a variety of payroll functions. These include completion of forms: STD. 672, Time and Attendance, for both negative and positive attendance employees; STD. 603, Report of Absences without Pay; STD. 666, Report of Exceptions to the Payroll; STD. 674, Payroll Adjustment Notice; STD. 671, Miscellaneous Payroll/Leave Actions; STD. 966, Employee Time Certification; STD. 683, Pay Adjustment Request and Form CD38, Payroll Warrant Register. Participants will learn how to reconcile Master Payroll, use the Master Payroll Certification (MPC) system, and read suspended payments and suspended transaction listings. They will receive a general overview of the account receivable process. This course emphasizes the important cutoff dates and the consequences when transactions are not processed on or before those dates. Participants learn and acquire processing skills through a variety of practical exercises and group problem-solving activities.

PREREQUISTES:

Must have at least FIVE months Civil Service personnel/payroll experience and have certified a minimum of one master payroll that included exceptions to the payroll. THIS CLASS IS A MANDATORY PREREQUISITE FOR THE GARNISHMENT DOCUMENTATION CLASS.

FUNDAMENTALS OF PERSONNEL (3 Days)

Elizabeth Edwards, Instructor  
(916) 322-7974 (CALNET 492-7974)  
E-Mail: eedwards@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course is designed for employees new to the personnel field. Participants will learn how to process appointments and separations regulations. They will also learn to ascertain the difference between permissive and mandatory actions on personnel issues and to compute state service, anniversary dates and probationary periods. The program provides information on terminology, control agencies information and reference materials used in personnel. The information in this course is essential for accurately completing specific items while documenting PAR transactions. THIS COURSE IS A MANDATORY PREREQUISITE FOR THE INTRODUCTION TO SALARY DETERMINATIONS CLASS.

PREREQUISITE:

Must have one month of Civil Service personnel experience prior to attending this course.

GARNISHMENT DOCUMENTATION (1 Day)

Blanca Hoffmann, Instructor  
(916) 324-7261 (CALNET 454-7261)  
E-Mail: bhoffmann@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course provides instruction on appropriate documentation methods used to correctly process all types of garnishments. This includes legal requirements placed on departments by the courts, Internal Revenue Service and the Franchise Tax Board. Earnings withholding orders for support, arrearages, federal and state tax levies, student loan defaults and on-going support garnishments are explained. This class reviews the redeposit of support garnishments warrants; multiple garnishments and bankruptcies. Participants learn the essential elements for Garnishment Documentation through practical exercises, examples and by using the Payroll Procedures Manual (PPM).

PREREQUISITES:

Is responsible for completing garnishment documentation, has five months Civil Service personnel/payroll documentation experience AND HAS SUCCESSFULLY COMPLETED THE FUNDAMENTALS OF PAYROLL COURSE.

NON-INDUSTRIAL DISABILITY INSURANCE (NDI) PROGRAM (2 Days)

Lynda Jones-Wark, Instructor  
(916) 324-7203 (CALNET 454-7203)  
E-Mail: ljones@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course provides a complete overview of the NDI benefit program including laws, rules, regulations, policies and procedures. The Employment Development Department (EDD) claim process, collective bargaining considerations and personnel/payroll documentation requirements are also covered. The course examines the different NDI benefits and calculation methods used for computing regular NDI benefits and annual leave benefits. Worksheets are provided to assist in annual leave NDI computations. Practical exercises include PARs; form STD. 674D, Industrial/Non-Industrial Disability Pay/Adjustment Request; form STD. 671, Miscellaneous Payroll/Leave Request; EDD claim forms and annual leave calculations.

PREREQUISITES:

IS RESPONSIBLE FOR COMPLETING NDI TRANSACTIONS, has at least four months Civil Service personnel/payroll experience and HAS SUCCESSFULLY COMPLETED THE PAR DOCUMENTATION COURSE or HAS HAD THE RESPONSIBILITY FOR DOCUMENTING PARs FOR AT LEAST FOUR MONTHS.

PAR DOCUMENTATION (2 Days)

Doris Meekins, Instructor  
(916) 324-7274 (CALNET 454-7274)  
E-mail: dmeekins@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

For those new to the personnel field, this course provides an introduction to the Personnel Action Manual (PAM). The primary emphasis is on the organization and use of the PAM. Participants receive a complete review of the PAM; completion of the six employment history documents; PAR Item definitions and the selection and use of the appropriate transactions charts. Practical exercises enable participants to become familiar with the PAM and the completion of personnel documentation.

PREREQUISITES:

Is currently responsible for documenting PAR transactions, AND, IN ADDITION, HAS HAD AT LEAST TWO MONTHS EXPERIENCE DOCUMENTING PARs.

PLEASE NOTE THAT THIS CLASS IS A MANDATORY PREREQUISITE FOR THE CORRECTIVE ACTIONS COURSE.

PAYROLL INPUT PROCESS (PIP) (1 Day)

Blanca Hoffmann, Instructor  
(916) 324-7261 (CALNET 454-7261)  
E-Mail: bhoffmann@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

Payroll Input Process (PIP) is a class designed for new Personnel Services Specialists who are processing pay transactions; i.e., overtime, positive pay and miscellaneous payments. Participants will be provided a program overview of the PIP application and keying experience for the five PIP screens: TA - Time and Attendance; MIS - Miscellaneous/Leave Actions; DCK - Dock; ETC - Employee Time Certification; ADJ - Pay Adjustment Request. Instructions for the available commands and Inquiry screens will be reviewed.

PREREQUISITES:

Have a MINIMUM of two months at the PSS1 level AND at least two key entry experiences on the PIP system.

SALARY DETERMINATIONS, ADVANCED (2 Days)

Elizabeth Edwards, Instructor  
(916) 322-7974 (CALNET 492-7974)  
E-Mail: eedwards@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course is designed for those who frequently use the salary rules and regulations. It gives practical experience in determining the correct salary rate in a variety of deep class movements. There

is emphasis on discretionary movements between deep classes, the Personnel Management Policy/Procedures Manual Section 315 and consecutive transfers. Laws, rules, DPA and SPB memoranda regarding deep class movement are discussed.

PREREQUISITES:

Must have completed the INTRODUCTION TO SALARY DETERMINATIONS course and has active involvement on a regular basis in the completion of salary determinations. THESE REQUIREMENTS ARE MANDATORY. ADMITTANCE TO ATTEND THIS PROGRAM WILL BE DENIED IF THE PREREQUISITES HAVE NOT BEEN MET.

SALARY DETERMINATIONS, INTRODUCTION TO (2 Days)

Elizabeth Edwards, Instructor  
(916) 322-7974 (CALNET 492-7974)  
E-Mail: eedwards@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

Supervisors/Training Coordinators, PLEASE NOTE:

While this class is an introductory class, it is NOT for staff new to the personnel transactions field. It is designed for staff with a working knowledge of personnel transactions. Prior to enrolling staff, please refer to course prerequisites (shown below) for the MINIMUM NUMBER OF REQUIRED MONTHS OF PERSONNEL EXPERIENCE.

This course provides the essential steps to correctly compute salary rates on new appointments, promotions, transfers and demotions. The primary focus is on the laws and rules pertaining to salaries and anniversaries, as well as the formulas used to determine the appropriate salary rule. Additionally, participants learn to apply information contained in the Civil Service Pay Scales and the rules and policies which are used to determine accurate salary rates and anniversary dates. Participants will gain a working knowledge of methods used to determine salary rates and anniversary dates with the use of practical exercises for new appointments, movement between alternate ranges and movement between non-deep classifications.

PREREQUISITES:

Must be responsible for determining salaries, has a minimum of six months personnel experience AND HAS COMPLETED THE FUNDAMENTALS OF PERSONNEL COURSE.

PLEASE NOTE THAT THIS COURSE IS A MANDATORY PREREQUISITE FOR THE ADVANCED SALARY DETERMINATIONS COURSE.

WORKERS' COMPENSATION: THE BEGINNING STEPS (1 Day)

Lynda Jones-Wark, Instructor  
(916) 324-7203 (CALNET 454-7203)  
E-mail: ljones@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course provides valuable information to personnel staff directly responsible for providing Workers' Compensation guidance to line-supervisors, managers, and/or employees. In-depth discussions include explaining Workers' Compensation benefits, eligibility requirements and the initial forms to be completed for injured employees. State Compensation Insurance Fund's (SCIF) role and responsibilities and the completion of various SCIF forms and form STD. 618S, Employee Benefit Options, are included. Participants will learn each area of responsibility for the injured employee, the line-supervisor and the personnel office.

PREREQUISITE:

HAS AT LEAST SIX MONTHS CIVIL SERVICE  
PERSONNEL/PAYROLL DOCUMENTATION EXPERIENCE.

PLEASE NOTE THAT THIS CLASS IS A MANDATORY  
PREREQUISITE FOR THE WORKERS' COMPENSATION  
DOCUMENTATION COURSE.

WORKERS' COMPENSATION DOCUMENTATION (3 Days)

Lynda Jones-Wark, Instructor  
(916) 324-7203 (CALNET 454-7203)  
E-mail: ljones@sco.ca.gov or the  
California Relay Service at 1-800-735-2922 (TDD)

This course provides current information regarding Industrial Disability Leave (IDL) including Enhanced IDL, IDL with Supplementation and Temporary Disability (TD). Participants learn to use a variety of reference materials to become familiar with the laws and rules governing Workers' Compensation. They research, discuss and apply regulations through networking, group problem-solving and independent study. Practical exercises include how to document personnel/payroll records for several disability cases. Added course features are written instructions and samples for abatements and SCIF payments calculated on the wage loss concept.

PREREQUISITES:

Must have completed the PAR DOCUMENTATION course or have six months Civil Service payroll experience documenting PARs. MUST HAVE COMPLETED THE WORKERS' COMPENSATION: THE BEGINNING STEPS CLASS. The enrollee should be responsible for completing Workers' Compensation transactions.

RZ:JBC:TSSS